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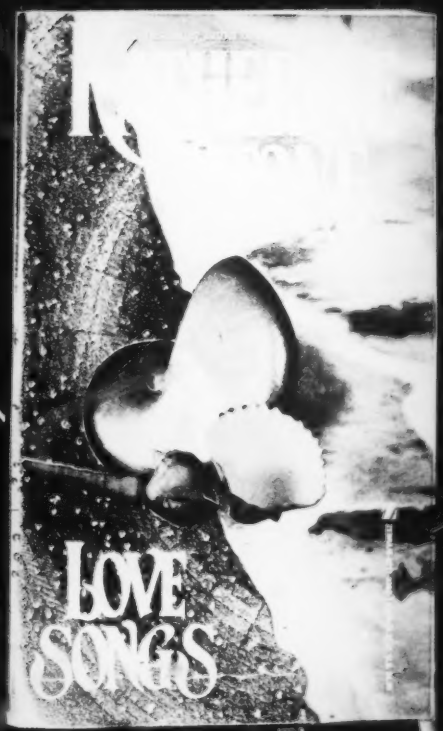

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1989 Growth Rate of Public Firms Is Slowest in Five Years

Profitability of publicly traded publishing companies plunged in 1989, according to a sampling conducted by investment bankers Veronis, Suhler and Associates. Deep operating income declines at two of the companies in the study, Harcourt Brace Jovanovich and Paramount—which together accounted for 30.3% of the combined revenues—contributed in large part to the gloomy figures. Although revenues of the two firms rose 7%, their operating incomes fell $318 million, from $325.7 million in 1988 to only $7.7 million in 1989.

These figures appear in the recently released analysis of 25 publicly reported companies in Veronis, Suhler's eighth annual Communications Industry Report (1985–1989).

Public companies posted combined revenues for 1989 of $7.3 billion, an 7.6% gain, well below the 12.8% compound annual revenue growth rate for the 1985–89 period. [The "adjusted" total (see box) removes figures for the four asterisked companies, which had no figures in several years.]

If HBJ and Paramount are excluded, the operating income for the remaining 23 companies declined only slightly, by $4.7 million, or 0.9%.

Veronis, Suhler estimates that revenues of the 25 publicly traded companies accounted for about 75% of total public and private U.S. book publisher revenues in 1989. [There are no figures for HarperCollins, whose numbers were not broken out by parent News Corporation in 1989.)

25 Companies and How They Grew

	COMPANIES	'89 Revenue ($ mil.)	'89 Growth (%)	'85-'89 Compound Annual Growth (%)
1	Berkshire Hathaway (World Book)	338.4	0.1	NA
2	Educational Development Corporation	3.9	21.6	10.3
3	Goodheart-Willcox	9.4	25.2	8.9
4	Harcourt Brace Jovanovich	885.7	2.0	18.4
5	Houghton Mifflin	404.4	9.8	9.9
6	*Maxwell Communication Corporation (Macmillan)	759.9	107.3	NA
7	MCA (G.P. Putnam's Sons, Berkley Publishing Group)	189.4	7.7	8.2
8	McGraw-Hill	499.6	10.2	10.7
9	Thomas Nelson	59.4	20.9	6.3
10	Paramount Communications (Simon & Schuster, Prentice-Hall)	1,319.8	10.6	13.4
11	*Pearson (Penguin, Addison-Wesley)	1,089.1	26.5	NA
12	Plenum Publishing	47.6	9.1	6.6
13	Price/Stern/Sloan	41.0	-27.4	11.7
14	Quarto Group	59.2	70.7	50.9
15	*Reader's Digest Association	1,086.2	6.8	NA
16	*Reed International	636.4	23.2	NA
17	William H. Sadlier	19.3	15.0	1.9
18	Scholastic Corporation	374.6	25.0	20.1
19	Senior Service Corporation	8.8	48.0	NA
20	Time Warner (Time-Life Books, Little, Brown, BOMC)	1,148.0	11.5	14.3
21	Times Mirror	960.3	11.9	16.9
22	Torstar (Harlequin)	265.3	-5.3	10.0
23	Waverly Press	62.8	13.4	14.4
24	Western Publishing Group	365.9	-14.4	15.3
25	John Wiley & Sons	209.5	7.3	6.0
	GROSS TOTAL	**10,843.9**	**13.9**	**27.5**
	ADJUSTED TOTAL	**$7,272.3**	**7.6%**	**12.8%**

Based on Veronis, Suhler & Associates' Communications Industry Report.

S & S Launches Literacy at Work Program

Simon & Schuster and the National Alliance of Business, which was founded in 1968 to link businesses with education, labor, government and civic groups in an effort to help the disadvantaged gain employment, have joined forces to develop literacy on the job.

The centerpiece of the partnership is *Literacy at Work: The Workbook for Program Developers*, a new handbook published by Simon & Schuster Workplace Resources. It focuses on the "functional context" approach, originally developed by the U.S. military, which provides literacy instruction by using actual job materials and procedures. The approach emphasizes "learning in order to do rather than learning to know," said Benita Somerfield, president of S & S Workplace Resources.

NAB will offer seminars for corporate personnel on training and curriculum writing; it has also prepared a marketing kit that outlines the benefits of the program for senior executives.

Time Warner Also Acts

In another literacy action by a media company, Time Warner has joined with the United Nations Association of the USA and the Weyerhaeuser Family Foundation in sponsoring a national literacy conference at the United Nations on Dec. 3.

Fifteen national literacy organizations will take part in the conference, which will include seminars on combating illiteracy and is expected to draw 500 participants.

Time Warner's Time to Read, a not-for-profit program started in 1985 to assist functional illiterates, now operates at 66 sites in 14 states. The company also provides 250,000 free subscriptions for *Sports Illustrated for Kids* to students in 1350 schools in low-income neighborhoods.

Simon & Schuster to Pay Freelancers Caught in Silver Burdett Dispute

Simon & Schuster has apparently decided to pay the 35 freelancers caught in a dispute between its subsidiary Silver Burdett and Kipling Press, a children's book packager.

The dispute centered on $34,000 owed to 35 freelance editors, proofreaders, photo researchers and copy-editors who worked on a series of Civil War and civil rights biographies contracted for by Silver Burdett through Kipling Press. Silver Burdett claimed the debt was Kipling's responsibility, while Kipling Press blamed the debt on what it charged were Silver Burdett's excessive editorial demands (News of the Week, Sept. 21).

Marcia Newfield, one of the freelance editors, said most of the workers had received a letter and payment from John Sargent, publisher of Simon & Schuster's children's book division. In the letter Sargent notes that Silver Burdett's transfer into the children's book division made him aware of the problem. Sargent writes, "It is clearly their [Kipling Press's] responsibility to compensate you, but I do not think it is fair that you remain unpaid."

Newfield said, "We appreciate that Sargent has gone out of his way to repair the relationships between Silver Burdett and the people who worked on those books. We feel vindicated."

Newfield also noted that the National Writers Union, invited by the freelancers to represent them, had informed Sargent and Simon & Schuster that it had sent 75 letters to schools and libraries urging them to refrain from purchasing the books until the workers were paid.

AAP Sales Report for September

Category	% change, September	% change, YTD
Adult hardcover	2.9	5.5
Adult paperback	-17.7	6.9
Juvenile hardcover	12.3	19.1
Juvenile paperback	-12.9	20.7
Univ. pr. hardcover	-12.9	5.2
Univ. pr. paperback	1.9	16.7
Bibles, etc.	-16.2	6.8
Mass market paperback	19.4	10.2
Book club	3.2	0.3
Mail order	-31.9	-15.4
Sci-tech	9.0	9.7
College texts	3.4	7.2
School texts	9.4	3.5

**Percent changes measured against same time periods, 1989.*

In Reversal, Books Are Now Banned Under Iraq Trade Embargo

U.S. book publishers who thought they could still ship books to Iraq and Kuwait despite the United Nations embargo against trade with those two nations are now incorrect, according to the U.S. government.

After Iraq invaded Kuwait, the U.N. adopted an embargo against trade with both nations, and the U.S. government followed suit with an executive order that has the force of law barring U.S. commercial ventures from doing business there.

But the original executive order, dated August 2, said books and medical supplies were exempted from the embargo, and trade could continue in those areas. That was in accord with U.S. policy in previous embargos. Later, however, the government issued a new executive order stating that the first was incorrect, that under the U.N. embargo, informational material such as books was included in the ban.

The Association of American Publishers contacted the State Department to ask for a clarification of the contradictory orders. AAP President Nicholas Veliotes said the association finally received word at the end of October that the U.N. embargo did indeed ban shipments of informational material and that the U.S. government was obligated to comply with it.

The final decision on U.S. executive orders rests with the Office of Foreign Assets Control in the Treasury Department. Veliotes added, however, that the State Department said it would ask the United Nations that books be exempted from the embargo. —H.F.

200 Minority Publishers Confer, Consider 'Incubator' Project

With three weeks to go before the first conference of the Minority Publishers Exchange on "Networking for Success," conference chair Charles Taylor had to wonder whether it was possible for only 11 conferees to network in any meaningful sense. But then Taylor witnessed what he called "a miracle"—a sudden, 11th-hour barrage of reservations.

Lured to the Inn on the Park Hotel in Madison, Wis., by the prospect of three days of swapping stories, tips and business cards, 200 independent publishers of color met October 18–21 to take in 18 workshops on marketing, distribution, and special topics, and to help launch the MPE as an international association. (One item on the agenda: a possible name change.) They also came, Taylor hoped, as potential tenants in the nation's first publishers of color "incubator," a building in Madison in which rent, equipment, graphic art services and mailroom services could be shared.

Taylor, who owns Praxis Publications, said the conference grew out of a concern that publishers of color faced many obstacles in getting their books marketed and distributed. That view was echoed by keynoter Nicolas Kanellos, founder and director of Arte Publico Press, the oldest and largest publisher of U.S. Latino literature, who spoke vividly about the "ideological, structural and business barriers" to minority publishers. "There's no question that the commercial publishing industry is bigoted and chauvinistic," he remarked to the small but responsive group of conferees. "They are not concerned with quality, and they are not concerned with equality, or demographic representation. Quality, to the big houses, means marketability, profitability."

Where many in attendance used the image of a closed (or nearly closed) door to describe the reception given them by commercial publishers, Rennie Mau of Family Media Publishing, an audiotape publisher in Sebastopol, Calif., said his Asian-American counterparts called it "The Great Wall." "The most frequent question I'm asked is how long have I spoken English," said Mau, who is of Hawaiian descent. "And I've been here for four generations."

James Peebles, founder of Winston-Derek Publishers

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